DOCUMENT RESU"E

ED 118 024 HE 007 055

AUTHOR Shulman, Carol Herrnstadt
TITLE Premises and Programs for a Learning Society. ERIC/Higher Education Research Report No. 8.
INSTITUTION George Washington Univ., Washington, D.C. ERIC Clearinghouse on Higher Education.
PUB DATE 75
NOTE 56p.
AVAILABLE FROM American Association for Higher Education, One Dupont Circle, Suite 780, Washington, D. C. 20036 ($3.00)

EDRS PRICE MF-$0.83 HC-$3.50 Plus Postage
DESCRIPTORS Adult Education; Change Strategies; *Continuous Learning; Educational Alternatives; Educational Needs; Educational Objectives; Equal Education; Federal Aid; *Higher Education; Models; *Public Policy; *Social Change; State Aid; *Universal Education

ABSTRACT

Lifelong learning in the United States and recurrent education in Europe are new models of education that permit those beyond post compulsory education to have access to higher education throughout their lifetimes. The rationale behind these models is based on the idea of a "learning society" that accommodates changing social and personal goals and promotes social equity. There appears to be a sharply increasing interest in further education on the part of adult Americans and a clear movement by American colleges and universities toward expanding the lifelong learning concept. Our decentralized educational structure is likely to temper some of the widespread changes advocated by proponents of lifelong and recurrent learning, but such programs will receive increased funding from federal and state sources. (Author)

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1975

Premises and Programs for a Learning Society

Carol Herrnstadt Shulman

ED118024

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Premises and Programs for a Learning Society

Carol Herrnstadt Shulman

ERIC/Higher Education
Research Report No. 8
1975

Prepared by the
ERIC Clearinghouse
on Higher Education
The George Washington University
Washington, D. C. 20036

Published by
the American Association
for Higher Education
One Dupont Circle, Suite 780
Washington, D. C. 20036

This publication was prepared pursuant to a contract with the National Institute of Education, U. S. Department of Health, Education and Welfare. Contractors undertaking such projects under government sponsorship are encouraged to express freely their judgment in professional and technical matters. Prior to publication, the manuscript was submitted to the American Association for Higher Education for critical review and determination of professional competence. This publication has met such standards. Points of view or opinions do not, however, necessarily represent official views or opinions of either the American Association for Higher Education or the National Institute of Education.

Foreword

Lifelong learning in the United States and recurrent education in Europe are new models of education that permit those beyond the traditional college age to have access to higher education throughout their lifetimes. The rationale behind these models is based on the idea of a "learning society" that accommodates changing social and personal goals and promotes social equity. The author concludes that there is a sharply increasing interest in further education on the part of adult Americans and a clear movement by American colleges and universities toward expanding the lifelong learning concept. She further concludes that our decentralized educational structure is likely to temper some of the widespread changes advocated by proponents of lifelong learning, but that such programs will receive increased funding from federal and state sources. Carol Herrnstadt Shulman is a research associate at the ERIC Clearinghouse on Higher Education.

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Overview

In the 1970's there is increasing dissatisfaction with the traditional pattern of postsecondary education whereby virtually all undergraduate postsecondary educational opportunities are expected to be used by the 18- to 22-year-old population. Many critics of this pattern believe that it limits individuals socially, economically, and personally by fostering the idea that education is completed with the earning of postsecondary degrees. While this idea may have been valid in the past, today's critics charge that, in reality, contemporary society burdens the individual with rapid socioeconomic changes that require reentry into formal learning experiences throughout a lifetime.

Futhermore, the present educational system has been attacked for its failure to live up to its promise as a prime mechanism for achieving social equity. This view is based on three considerations. First, the system serves as a sorting mechanism that forecloses opportunities for social and economic advancement at an early age, since young adults are required to make positive or negative decisions about postsecondary education that effectively determine the course of their career development. Second, there are new findings, notably by Christopher Jencks (see Halsey in Mushkin 1973, p. 9), that many factors other than higher education account for social and economic success. And third, there is the growing recognition that college degrees no longer can command employment or the high salaries that in the past distinguished the college graduate from the high school graduate.

A new philosophy of postsecondary education is emerging out of these criticisms of the present system. Educational planners in Europe and the United States advocate the development of "a learning society," a conception of society in which learning over a lifespan is considered the preferred method of education, and in which national policy fosters public support for and participation in this approach to education. This concept would open up opportunities for adults to reenter the educational system as they perceive the need for adaptation and change, and it would encourage greater social equity by diminishing postsecondary education's role as an early sorting mechanism.

Two major strategies have been proposed for implementing the learning society concept—lifelong learning and recurrent education.

Lifelong learning, the term preferred by Americans, refers to the development of public policies that would encourage adult learning over a lifespan on either a full- or part-time basis. The formal learning experiences could be used to develop personal or career goals. The implementation of this concept would not necessarily affect the current patterns of secondary and postsecondary education. In contrast, the recurrent education concept, which originated in Europe, is understood primarily as the development of a national policy that would provide citizens with opportunities to alternate periods of work with periods of formal learning throughout their lives. In general, the learning experiences are to be related to career goals. Moreover, the implementation of a recurrent education strategy ultimately might require an overhaul of the secondary school system so that it would better prepare high school graduates to enter the job market and postpone further education to some future date.

If such strategies are to be implemented, educational planners need to know how the adult population would view new opportunities for learning and at what rate they would participate in these educational activities. In the United States this information is not readily obtainable—because of lack of research in this area and because those studies that do exist differ in their definitions of the adult population and of learning experiences. Overall, however, there is sufficient evidence available to show that adults are interested in new learning experiences and that many seek these out in a wide range of formats for multiple purposes. In addition to the adults already enrolled in educational programs, a recent study (Carp et al., 1974) has shown that more than three-fourths of the adult American population is interested in further learning, and that nearly half of this group has pursued educational interests. The Carp study reports that more adults believe they would become involved in further education if problems of financing education, geographical access, and time restrictions were alleviated.

The discussions on recurrent education and lifelong learning have led to some concrete developments in Europe and the United States. For example, Sweden has begun a program to implement recurrent education by redesigning its educational system, first at the postsecondary level and gradually at the secondary school level. A fundamental purpose of this reorganization is to promote social equity. Several strategies will be employed to achieve this goal. For instance, the new system will permit easy movement between periods of work and periods of formal learning experiences by offering multiple types

of programs, some short-term, which will be developed to meet local community, or individual needs, as well as long-term programs.

In the United States, there has been both national and state interest in the development of lifelong learning. On the national level, Senator Mondale introduced the "Lifetime Learning Act" in fall 1975. Its expressed purpose is to "meet the changing educational needs of Americans at all stages of life" (Mondale 1975, p. S 17747). Proposed legislation would establish an Office of Lifetime Learning Programs in the Office of Education to encourage and support the development of programs for adult lifetime learning.

There have also been discussions by educational planners and economists on how lifetime learning would be financed nationally. In general, the proposals offered call for the establishment of a system of educational "entitlements," i.e., specified amounts of funds that a citizen could draw upon for educational purposes. The plans suggest various mechanisms for establishing the fund from which the entitlement would be drawn, and also the criteria for eligibility to use the entitlement. One such proposal, developed by Stephen Dresch (in Mushkin 1973), would establish an educational fund based upon an income tax collected from those individuals who by age 25 chose to participate in the entitlement program. The entitlement would be broadly restricted to educational activities that further the individual's capacity for a productive role in society until age 48. After that time, the individual could use his entitlement for any purpose he desired.

Although state postsecondary education systems have long been active in the promotion of extension and continuing education programs, there has been only slight attention given to examining these programs in light of recurrent education and lifelong learning concepts. In Massachusetts, a state-sponsored study proposed that the state use its programs of continuing and part-time education as the base for an alternative postsecondary system for adults (Nolfi and Nelson 1973). The same study recommended the use of a voucher system for qualified adults to further their education; this proposal is pending before the Massachusetts State House as "The Adult Recurrent Education Entitlement Program."

At a grass roots level, higher education institutions and adults seeking educational opportunities have begun to develop new methods for encouraging adults to enter into formal experiences. Institutions have developed new programs to increase dwindling enrollment and to serve unmet adult needs. They have used marketing techniques to uncover these needs and to learn how to lower barriers to access.

For example, the Weekend College of the C.W. Post Center of Long Island University has successfully attracted students to its campus because of the flexibility it offers adults in planning their learning time: students meet for six consecutive six-hour sessions on a Saturday or Sunday, or two two-day weekends separated by five weeks of independent study.

Advocates of the learning society have raised major questions about the efficacy of the current pattern of postsecondary education. While recognizing their criticisms, educational planners must ask, in turn, if the reforms proposed will deal successfully with the problems caused by contemporary social and economic conditions. In the United States, it appears that the more radical changes envisioned by lifelong education advocates are unlikely to occur because of this country's decentralized educational structure, which would make the necessary unanimity improbable, and because of the financial costs involved in such an undertaking. More probable is an increase of federal and state involvement in supporting current lifetime learning activities and promoting their further development.

Reexamining Postsecondary Education

There is increasing debate about whether postsecondary degree programs designed for students aged 18 to 25 necessarily provide them with all the formal educational experiences they will need throughout their lifetimes. In more static social periods, this academic preparation was generally regarded as sufficient for an adult's career and intellectual needs. But the accelerated pace at which social, economic, and technological changes now occur in highly developed societies may make this early education ill-suited or quickly outmoded for later career and personal development. Confining postsecondary education only to the early adult years may therefore be inefficient and wasteful of both personal and social resources.

Consequently, some educational planners in western Europe and the United States have begun discussions on new educational strategies that would provide formal learning opportunities for adults from the end of compulsory education through retirement. These planners use new terms, e.g., lifetime learning and recurrent education, to distinguish their proposals from the traditional concepts of adult and continuing education. The belief underlying the new terminology differs from the older concepts in asserting that education over a life span is necessary for a productive society as well as individual happiness, and that therefore governments have a strong interest in promoting lifelong learning within a comprehensive, organized structure.

Support for the lifelong learning concept also occurs at the grass roots level in the individual efforts of adults over 22 years of age to obtain further learning. These efforts are significant. In 1972, 31 percent of all college graduates and 23 percent of all adults who had completed some college work participated in continuing education programs. Furthermore, the adult participation rate in postsecondary education is increasing at about 5 percent per year (Weathersby and Nash 1974, p. 10).

In view of this proven interest in education and the potential for growth in the number of adult students, many colleges and universities are giving greater consideration to the educational needs of adults and making efforts to attract these learners to new, flexible academic programs designed especially for them. These efforts have focused the higher education community's attention on the capa-

bilities, interests, and problems of adult learners to a greater extent than before. In the process, educational programs designed for adults are gaining a new respectability. Along with these developments, federal and state governments have become interested in the concepts of lifetime learning and recurrent education, and are exploring methods for adapting these ideas to the American higher education system. The merging of higher education activity and governmental interest may therefore encourage further development in this area.

Accordingly, a fundamental reexamination of traditional higher education's value to the individual and to society is underway in America and western European countries. Two major premises of traditional postsecondary education are the principal subjects of this reexamination; (1) *a postsecondary education program will prepare a student for a productive, lifelong role in a highly developed society;* and (2) *postsecondary education can serve as the chief mechanism by which a society provides social equity and upward mobility for its citizens.* This chapter will consider the arguments on why these premises may no longer be attainable under the current system and also will describe the evolving perceptions of how the educational system may be altered to return postsecondary education to these goals.

Preparation for a Productive Role

Recently, some educational leaders have stressed the need to provide occupational training in colleges and universities. They believe that a liberal arts education is not easily translated into job training. This tendency to equate educational and occupational goals has led some liberal arts colleges to reorganize their curricula to better serve students' interests in career preparation (Trivett 1974), and is being pursued by government leaders who are concerned with the relationship between postsecondary education and economic prosperity (O'Toole 1975b). The U.S. Commissioner of Education, T.H. Bell, is an advocate of this position:

> . . . the college that devotes itself totally and unequivocally to the liberal arts today is just kidding itself. . . . we in education must recognize that it is our duty to provide our students also with salable skills. . . . if we give [them] a useful skill, we give them not only the means to earn a good living but also the opportunity to do something constructive and useful for society (Bell 1975, pp. 3-4).

Those in sympathy with this position agree that a knowledge of traditional liberal arts subjects is still important for a sound cultural

background, but they assert that career-oriented subjects and goals should be emphasized. However, others believe that this view of a liberal arts education shows a lack of understanding of the benefits derived from liberal arts education in the teaching of certain skills that are important to the development of any career objective. A 1945 report from the Harvard Committee emphasizes the importance of developing these capabilities through a liberal arts education:

> By characteristics [of mind fostered by education] we mean aims so important as to prescribe how general education should be carried out and which abilities should be sought above all others in every part of it. These abilities, in our opinion, are: *to think effectively, to communicate thought, to make relevant judgments, to discriminate among values* (pp. 64-65).

Supporters of lifetime learning recognize the importance of both the occupational and liberal arts goals of postsecondary education, but they question whether the current system adequately meets these goals. The current system may be characterized as a "front-end-load model" (Stein and Miller 1972) in which all formal preparation for lifetime career and personal development is provided during the years prior to entry into the labor market and participation in adult life. They contend that this system does not enable individuals to adapt their knowledge and skills to new circumstances that continually arise in a highly technological society that characteristically is in a state of continual change. Kallen and Bengtsson (1973) explain:

> Increasingly rapid technological change and the continuous transformation of the organizational patterns of work have a direct impact on the conditions that the individual meets and shapes in his work situation. At the level of the labour market, the need for skilled manpower in both quantitative and qualitative terms depends on more and more complex national and international developments. As a result, it is becoming difficult to ensure a satisfactory interplay between the world of work and the educational system (pp. 41-42).

They also observe subtle, new facets in the relationship between economies and education, with the introduction in the American economy of "knowledge" as a component of the capital-labor relationship. That is, the relationship is becoming "a capital-knowledge-labor relationship, with competence and skills based on knowledge playing an increasingly important role" (p. 44). This definition of knowledge is placed in a vocational context, but is reminiscent of the Harvard Committee's concept:

> "knowledge" . . . means the ability to use knowledge in order to discriminate and to judge, which is more a matter of having a set of relevant concepts at one's disposal than knowing the facts. It is . . . the inability to renew one's concepts to make appropriate use of them that has the most serious consequences for people's ability to function in the various situations in which they are placed (Kallens and Bengtsson 1973, p. 45).

Others, including students, who are aware of the rapid pace of technological change agree on the limitations of the current system (Wolfe and Williams 1974; Faure 1972; Mushkin 1973):

> . . . students have begun to realize as individuals what universities must eventually realize as institutions; it is no longer possible for a university to offer, within a four-year span, a "complete" education (Wolfe and Williams, p. 291).

Yet, the problems of the current system of postsecondary education extend beyond the education-work relationship: technological change does not occur in a vacuum but is related to social and cultural changes. Individuals may want educational opportunities at intervals throughout their lifetime:

> The more powerful the [technological] system becomes the more necessary it is that education contributes to the capacity of populations to use and enjoy the abundant material environment which they thereby create (Halsey in Mushkin 1973, p. 91).

Achieving Social Equity

Since World War II, higher education has been regarded increasingly as the prime mechanism for opening opportunities for better jobs, higher incomes, and greater social status for a large segment of the population. This perception of higher education's role has become a rationale for providing some form of postsecondary educational opportunity for virtually every high school graduate (Newman in Mushkin 1973). However, there is a growing debate over whether increased access to postsecondary education results in a better job and its hoped-for correlates, higher income and social status.

Christopher Jencks questioned this assumption in a well-known study:

> while occupational status is more closely related to educational attainment than to any other thing we can measure, there are still enormous status differences among people with the same amount of education. This remains true when we compare people who had not only the same amount

> of school, but the same family background and the same test scores (quoted by Halsey in Mushkin 1973, p. 9).

In fact, the promise and achievement of universal access to post-secondary education may create more social equity problems than it solves:

> It is now becoming clear the ever-expanding supply of educated workers is running up against a ceiling of job demand (O'Toole 1975a, p. 27).

This decline in employment prospects for college graduates, which began in 1970, may not be the result of depressed market conditions, but the beginning of a long-term deceleration in the demand for college graduates (Freeman and Hollomon 1975).

These job market problems will have long-range implications for higher education as a route to greater social equity. Freeman and Hollomon point out that there already has been a significant decline in the income college graduates earn over high school graduates:

> In 1969, full-time male workers with four years of college earned 55 percent more than male workers with four years of high school; in 1973, 40 percent more (Freeman and Hollomon 1975, p. 25).

Lack of return on their investment in higher education is motivating college-age students to choose other alternatives. Freeman and Hollomon note that the percentage of 18- and 19-year old men attending higher education institutions fell from 44 percent in 1969 to 33.4 percent in 1974. While this decline has occurred among all social groups, it has been most noticeable among new students from the lower middle class. Freeman and Hollomon suggest that these trends

> [imply] the virtual end of education as a means of upward mobility in society as a whole. For the first time in American history, there will be considerable downward generational mobility, as many young people will obtain less schooling than their parents (p. 31).

A New Philosophy of Education

In 1971, the Carnegie Commission on Higher Education commented:

> society would gain if work and study mixed throughout a lifetime, thus reducing the sense of sharply compartmentalized roles of isolated students v. workers and of youth v. isolated age. The sense of isolation would be

> reduced if more students were also workers and if more workers could also be students (p. 2).

Compartmentalization tends to reduce the benefits of higher education because it prevents the integration of what is learned with what is experienced (O'Toole, in Vermilye 1974). Policy makers are evolving a new understanding of the place of formal education in adult life that they believe can remedy the current system's shortcomings in meeting career and social goals. In this view, postsecondary education plays such an important role in our society that its benefits must not be relegated to early adulthood, but must be spread throughout a lifetime. Halsey explains:

> in the post-industrial society, schools and colleges come to occupy a place as central as that previously held by the business enterprise. Educational institutions . . . manage the transmission of culture, determine through research the direction of technology and, therefore, social change, and select and form social personalities for places in the occupational structure. Thus, education becomes an arena of modern political and social conflict, since equity, or its reverse, is distributed through schools and colleges (Halsey, in Mushkin, 1973, p. 95).

To meet this responsibility, educational reformers have developed the concept of "the learning society," envisioning a pattern of lifelong learning, an overall planning strategy, generally administered by governmental bodies.

European and American interpretations of the learning society concept are similar:

> [The learning society is] a process of close interweaving between education and the social, political and economic fabric. . . . It implies that every citizen should have the means of learning, training, and cultivating himself freely available to him, under all circumstances, so that he will be in a fundamentally different position in relation to his own education (Faure 1972, p. 163).
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> In the future, the United States should be conceived of as a learning society. Educational policy planning should begin with a comprehensive framework that addresses the needs of the entire population, from infancy through adulthood. The entire population should be seen as a national resource comprising a society in which continuous, purposeful learning is not only talked about but carried out in a great variety of settings and formats (Hesburgh *et al.* 1973, p. 4).

These concepts of the *learning society* differ from the traditional adult education structure, in that the learning society results from a

planned, long-term strategy for educational development; in contrast, *adult education* is commonly an appendage to the front-loaded model, and it is still a "generally non-systematized social phenomenon" (Ziegler 1972, p. 14).

Lifelong learning and recurrent education are proposed as the systems for building a learning society. The two terms however, are not the same. Lifelong learning is the term preferred by Americans (e.g., Mondale 1975; Ferber 1975; Hesburgh *et al.* 1973) and refers, rather ambiguously, to a public strategy by which adults can obtain educational experiences throughout their lives on either a full- or part-time basis. The learning experiences sought need not be related to career objectives, but can satisfy any educational need. Although governmental support would be necessary to implement this concept, a life-long learning system would allow the free play of competing institutions and programs to meet adult needs. Moreover, it would not necessarily affect the traditional postsecondary educational system for 18 to 22 year olds. Overall, it is a more informal concept than the proposals for recurrent education.

Recurrent education advocates, generally Europeans, propose strategies more appropriate for their centrally-controlled systems of post-compulsory education. They view recurrent education as a method for reorganizing all post-compulsory education, so that intervals of work and relevant learning experiences alternate throughout a worker's lifetime. Such education would be formal, full-time, and for credit (Ziegler 1972). Basic education would provide students with immediate postgraduation options for work and for learning.

In contrast to lifelong learning, recurrent education would create major changes in educational organization:

> recurrent education is a proposal for a new, alternative educational strategy which is meant to replace the full array of educational provisions, formal and informal, for young people and adults, at present available. . . . Its planning includes suggestions for a gradual re-orientation of the present towards the future and hence it has immediate implications for educational policy and innovation at all levels (*Clarifying Report*, 1972, p. 9).

If this strategy were implemented, then adults would have available to them a systematic approach to acquiring learning at times in their lives when such new knowledge would be most meaningful:

> "Recurrent education" . . . is a system for acquiring *modular segments of knowledge* and skills beginning at the end of compulsory education and

> continuing through a lifetime at the option of the individual (emphasis added) (Mushkin 1973, p. 295) [1].

The recurrent education and lifelong learning concepts appear to be well suited to meeting contemporary career and personal educational needs on a continuing basis. If implemented, they would provide ready mechanisms (see chapter 3) for moving in and out of the educational system throughout adult life. The emphasis in proposals for recurrent education does tend to be on vocational education, but a particular program could establish personal educational objectives as well as vocational goals.

As alternatives to the front-end-loaded system of postsecondary education, lifelong learning and recurrent education are also viewed as more effective strategies for promoting social equity because they eliminate the second class connotations of later life learning experiences: in a learning society all learning activity is respected and has first-class status. J. R. Gass, of the Organisation for Economic Cooperation and Development, explains:

> The response to the persistence of inequalities does not lie in giving up education as a tool of redistribution, but in relating it more effectively to the other relevant policies, and thereby strengthening its effective role in equality. The struggle for equity has to be across-the-board and penetrate more deeply into the life cycle (in Mushkin 1973, p. 15).

Gass also observes that unless there is a broad public policy that creates a *right* to postpone higher education to later periods in adult life, "social selection through education is likely to be reinforced" (in Mushkin 1973, p. 17).

Some critics question, however, whether a system of lifetime learning or recurrent education will foster social equity through edu-

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[1]One writer (Regan et al, 1972) has suggested that a program offering meaningful opportunities for recurrent education should have six basic elements:

> (1) Entry into postsecondary education following post-compulsory education.
> (2) Curricular design and teaching methodology designed cooperatively by students and faculty and adapted to the interests, accomplishments, and motivations of different age groups and social class groups.
> (3) Sufficient flexibility in location and time arrangements so that the program is readily available to working people.
> (4) Use of appropriate life experience as equivalent to formal course work.
> (5) Opportunity to pursue educational objectives in an intermittent fashion.
> (6) Public acceptance of the degrees or certificates offered by this program (p. 10-11).

cational attainment. Warren L. Ziegler, for example, comments that current experience indicates that the adults who take advantage of later-life learning opportunities have already achieved at least some upward mobility. He notes that recurrent education is not suggested as a compulsory system of postsecondary education and, in the United States at least, asks whether its noncompulsory character would make it attractive to those who have been disenfranchised by the traditional educational system:

> the very idea of *education* is so closely allied with the experience of *schooling* as to render unrealistic any traditional strategies for recruiting groups of last entry into a formal system of recurrent education. [Research is needed in the exploration of] alternative systems of sanctions and rewards for encouraging continuing learning among those adults who . . . are not habituated to the learning mode of response to challenge, change and crisis (Ziegler 1972, pp. 19-20).[2]

Summary

American and European policy makers are increasingly dissatisfied with traditional postsecondary educational opportunities. They believe young adults need other kinds of learning experiences to meet the challenges of a highly technological society. Further, despite increasing access to postsecondary education in all countries, social equity is not being achieved through traditional front-end-load education. As an antidote to these problems and as an approach to meeting the educational needs of a mature industrial society, educational observers propose the concept of a "learning society," in which lifelong educational endeavors for personal and career development are respected and supported by public policy, either through a "lifetime learning" or a "recurrent education" system. These systems are also viewed as vehicles for providing greater social equity than can be achieved through the current method of postsecondary education. In opting for these new approaches to education, policy makers need to be informed as to who in the adult population would be interested in new educational opportunities, what their interests are, and what are the perceived and real barriers to participation in lifelong learning and recurrent education programs.

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[2]Alternatively, he notes that other methods of achieving social equity that are not considered in discussions of recurrent education include: "a guaranteed annual income, the provision of adequate health care to all citizens, a truly progressive income tax structure, the separation of technical training from education. . . ." (p. 23).

The Adult Population

In their roles as students, adults (defined as individuals over 22 years old) constitute a significantly different segment of the student population. They differ from those in the 18 to 22 year old age group in their educational needs and modes of learning and in their financial problems. To plan lifelong learning or recurrent education programs in the United States policy makers need information on these differences and on strategies for dealing with them. This section will explore the characteristics and problems that distinguish the adult student from the undergraduate population.

Identifying the Adult Learner

As a basic planning tool, policy makers need information on what proportion of the adult population is interested in participating in any sort of educational program after their education has been "completed." This type of information is not easily obtainable. There is a wide range of definitions of "the adult learner" in the studies available, so that conclusions reached on the potential and actual pool of learners are not readily comparable. The literature also ranges from one definition of adult learning so broad that it considers many daily adult activities as "learning" (Tough 1971), to those studies that consider adult learning only in the context of institutional settings (e.g., Weathersby and Nash 1974). The first step in analyzing the adult market for lifetime learning is therefore to examine these studies' findings and perhaps arrive at some quantitative idea of the "adult learner" population.

Allen Tough (1973) developed a broad definition for adult learning that credits a substantial percentage of the adult population with having had educational experiences during any given year:

> A learning project is simply a major, highly deliberate effort to gain certain knowledge and skill (or to change in some other way). Some learning projects are efforts to gain new knowledge, insight, or understanding. Others are attempts to improve one's skills or performance, or to change one's attitudes or emotional reactions. . . . (Tough 1971, p. 1).

Despite this broad definition, Tough's study was very limited: only 66 people were surveyed, and the interviews tended to be highly structured. The persons interviewed were chosen from: "blue-collar

factory workers, women and men in jobs at the lower end of the white-collar scale, beginning elementary school teachers, municipal politicians, social science professors, and upper-middle class women with preschool children" (Tough 1973, p. 16). Tough reports a very high participation rate of 98 percent in learning projects, and attributes this finding to his interviewers' extensive probing of the learner, the broad definition of a "learning" project, and the fact that the interview population was not an unbiased sample of all adults (p. 17). Since a "learning project" is so broadly defined, Tough's findings on the amount of time spent on a project and the number of projects per year is important. He reports that on the average, each person interviewed spent 700 or 800 hours a year on learning projects and that each project consisted of about 90 hours. Less than 1 percent of all the learning projects were for credit (p. 18). Despite its small sample, Tough's study is significant because it demonstrates the interest and eagerness of adults to continue their learning in ways that are meaningful to them.

Another study frequently cited (Moses 1970) also recognizes that adults engage in learning activity that is often not recognized by educational observers. The author distinguishes between those involved in the "core" framework, *i.e.*, the traditional ladder of educational and sequential progression, and the "periphery," a wide variety of educational programs in business, government, proprietary schools, and cultural and leisure programs, which, however, occur in "an organized, structured learning situation" (p. 17). "Core" programs include all compulsory, basic education, and formal undergraduate and graduate education. In contrast, "periphery" refers to:

> the entire potpourri of programs carried on by the vast numbers of private associations, national welfare organizations, professional training societies, and specialized programs for adults carried on in regular education institutions (Moses 1970, p. 17).

"Structured learning situation" excludes programs such as museum visits, attendance at cultural activities, private tutorial instructions, etc. (Moses 1970, p. 17) and therefore is a narrower definition than Tough's for a learning project.

Moses developed his own statistical data, including projections for 1975, to demonstrate the importance of adult involvement in the educational periphery. The table below (Moses 1970, p. 22) indicates enrollment in the millions.

THE EDUCATIONAL PERIPHERY: ENROLLMENTS

	1940	1950	1955	1960	1965	1970	1975
1. Organizational	8.2	10.2	10.9	13.0	14.5	21.7	27.4
2. Proprietary	2.5	3.5	3.5	4.0	7.8	9.6	18.1
3. Anti-poverty	..	..	..	..	2.8	5.1	7.0
4. Correspondence	2.7	3.4	3.5	4.5	5.0	5.7	6.7
5. TV	..	..	..	.01	5.0	7.5	10.0
6. Other adult	3.9	4.8	5.1	6.6	9.1	10.7	13.2

At the time of Moses' writing, these numbers were considered a significant contribution to a little developed field. Moses himself was concerned with the lack of available data because he believed it had broader political implications:

> The lack of public information on the Periphery is a reflection of the existing framework of decision-making regarding education. Educational policy has generally focused upon the Core, and the orientations of public information agencies and policy makers have been restricted to gathering information regarding those activities. The educational system has been defined as one set of activities, and a network of interlocking agencies and institutions have developed on a local, state, and national level which share in the determination of educational policy. In an environment of scarce public resources, where their allocation is subjected to competing and conflicting claimants, the question as to which claimants are to be allowed consideration is a critical factor (Moses 1970, p. 26).

By 1972, this attitude toward adult learning had changed dramatically. For example, a prestigious National Commission on Non-Traditional Study had been formed whose very existence proclaimed greater public recognition and respect for learning experiences outside the traditional mode. Moreover, the Commission sponsored a study (Carp, *et al.*, 1973) to discover the nature of adult interests in further educational participation. This study conducted a representative sample survey to analyse the interests and needs of the 104 million people between the age of 18 and 65 who were not enrolled as full-time students. The researchers developed a weighted sample of 3,910 persons (p. 13), and their findings are reported as percentages of the sample, which may, with some caution, be read as projections to the 104 million population figure.

The survey's findings were divided into two major overlapping categories, "Learners" and "Would-Be Learners," of 1,207 and 3,001 individuals, respectively. The "Would-Be Learners" include 1,142 "Learners" interested in further learning; not all "Learners" ex-

pressed interest in further learning.[3] These findings were deemed significant:

> Expressed in percentage terms, 77 percent of adult Americans (aged eighteen to sixty) report interest in learning about some subject or pursuing some skill; a remarkable 31 percent of the population is engaged in some form of adult learning; and 95 percent of the present Learners wish to continue their learning (Carp, in Cross, *et al.*, p. 15).

The results also provided profile information on the Learners and Would-Be Learners. About 40 percent of the Learners were under 30, younger than the general adult population. There was a decline in interest and participation in learning after age 35, and a sharp drop after 55. Whites were somewhat better represented among the Learners than blacks (p. 17). Socioeconomically, the Learners differed from the Would-be-Learners in their greater amount of higher education and representation among the professional and business executive occupations. Finally, the Learners were largely concentrated in the West and in urban areas, a factor due at least in part to the higher levels of formal education and greater number of postsecondary education opportunities in those areas (Carp 1974, p. 17).

More recent information in a government-sponsored report indicates that adult participation in education is becoming significant to educational planners. *A Context for Policy Research in Financing Postsecondary Education* (1974) reports:

> The growing interest in and concern for recurrent education and the increasing social legitimation of adult and continuing education suggest that national policy decisions will soon encompass the total horizon of postsecondary education (p.3).

This report also provides statistical information on adult participation in further education, but it does not define what educational situations are considered or what the purpose and duration of the educational experience is. However, the potential learning settings appear to include virtually all available situations from the home to recreational groups. Another finding was that for persons 17 years of age and older, excluding full-time students, there is a participation rate in adult education of 12.4 percent for 1972 (p. 12).

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[3]Carp and his associates, in this study, took the measurement of the adult learning population one step further than Tough and Moses, by recognizing that some adults who do not participate in learning experiences may still constitute a potential student population group.

Another report views the question of adult participation in postsecondary education from the perspective of the part-time student. Part-time students constitute a growing and significant segment of the postsecondary student population, and there is a clear relationship between their needs and the potential support offered by a lifelong learning or recurrent education program. Part-time students increasingly dominate the student population:

> In 1972, for the first time in American history, approximately half of the students (degree credit, nondegree credit and noncredit) in postsecondary institutions of higher education participated on a part-time basis. . . . The rate of increase in numbers of collegiate part-time students between 1969 and 1972 was three and one-half times as great as for full-time students (Committee on the Financing. . . . 1974, p. 2).

Part-time students are distinguished from their full-time counterparts by their motives for further education. The Committee on the Financing of Higher Education for Adult Students (1974) found that full-time students generally attended postsecondary institutions to reach individual or family goals (p. 27) and did not share with part-time students three other influences. These are:

> (1) legal or peer group pressures on professional or occupational groups;
> (2) employee interest in participating in employer/organizational programs; and
> (3) motivation based on recruitment into educational programs which are part of broad public problem-solving programs of governments or private organizations (p.27).

These motivations may occur on a continuing basis. Therefore, the current part-time student population may be considered an important target group for lifelong or recurrent education programs.[4]

Identifying Adult Interests

Studies that measure adult interest in learning demonstrate that persons past the traditional postsecondary educational age are interested in further education. Based on this knowledge, lifelong learning and recurrent education advocates argue that the next step should be to develop programs, either on a broad, general population basis,

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[4]This report does not distinguish "adult" learners from the 18 to 22 year old student group, instead presuming that *"all students* in postsecondary institutions are adults with adult responsibilities. . . ." (p. 1). Their statistics therefore include the 18 to 22 year old group, which is excluded in other studies on adult participation in postsecondary education.

or targeted toward the interests of specific adult populations, that will attract an adult audience large enough to justify start-up and continuing program costs.

Carp's survey of the interests of Learners and Would-Be Learners found that these groups differed in their choice of learning activities. Would-Be Learners professed their greatest interest to be in vocational subjects, with 43 percent of that group giving this area as their first choice; in second place, general education, and hobbies and recreation, each received 13 percent of the Would-Be Learners vote. In the area of basic education, Would-Be Learners expressed greatest interest (9 percent) in business skills, followed by 5 percent in technical skills, and 4 percent each in vocational skills, industrial trades, nursing, child development, sewing and cooking, and investment (p. 21). In contrast, the largest group of Learners (42 percent) favored hobbies and recreation, while vocational subjects ranked second (35 percent), and general education, which included college and graduate level courses, ranked third at 25 percent (p. 24). (Some Learners indicated more than one first choice, so the totals equal more than 100 percent.) The authors explain:

> [The findings] indicate the greater interest in hobbies and recreation and personal development among those with formal education—both in a sense being luxuries that can be afforded by the better educated and more affluent. In contrast, the relatively high interest in general education among Would-Be Learners with eight years or less of education is due to their need for basic literacy education (p. 23).

These findings are not promising for traditional academic institutions seeking new students. Furthermore, two other results indicate that such institutions would have difficulty in attracting interest. First, on the subject of academic credit, Carp reported that the highest percentages of Would-Be Learners and Learners share a disinterest in learning for credit (p. 40). Second, both categories of learners preferred study locations other than the traditional college or university campus. For example, 17 percent of the Would-Be Learners chose public high schools as their first preference for a learning site, with the home, two-year colleges or technical schools, and community free schools receiving 10 percent (p. 32). Similarly, the Learners' first choice was home study (17 percent), followed by employer location (13 percent), and high school (9 percent).

It should be noted, however, that college locations are viewed more favorably by certain groups of Would-Be Learners and Learners. The researchers report that among the Would-Be Learners those with some

college experience but no degree showed three times more interest in learning at a four-year college than all respondents in general. In addition, twice as many adults with college experience or degrees are interested in learning in a collegiate setting compared with less educated adults. Viewed occupationally, those employed on the highest level are most interested in graduate schools, and white-collar workers express relatively greater interest in four-year colleges than blue-collar workers (Carp *et al.*, p. 34). Despite the findings, the authors conclude:

> Only 14 percent of the Learners pursued their studies on college campuses; only 21 percent of the Would-Be Learners report wanting to study at a college or university. While the absolute numbers may seem large, the fact that the overwhelming majority of adult Learners will wish to study elsewhere than on a college campus is a sobering finding which needs to be recognized by higher education planners (Carp *et al.*, p. 35).

Carp's study indicates that a substantial proportion of well-educated people use later education for noncareer reasons, but there is also evidence that adults in the middle of their working lives seek out and need specific kinds of mid-career educational opportunities. Alan Entine (1975) explains that an increase in the number of adults interested in such mid-life changes has occurred for several sociological and psychological reasons: (1) life span expectancy is increasing, but work-life expectancy is declining; (2) a dramatic change in the number of women in the workforce has occurred—more than 42 percent of the 1973 labor force was composed of women; (3) the increase in martial separations and divorces has led to more households headed by one adult; (4) the middle years of adult life are a period that can contain "profound crisis, change and personal growth" (Entine 1975, p. 4); and (5) studies indicate that job alienation increases among white-collar workers as they grow older because they may reach employment plateaus that lead to boredom and frustration (Entine 1975, p. 2-5).

Statistical information on the number of adults involved in such midlife changes is not available, but there are indicators that this group is large. For example, adult counseling centers are becoming commonplace. Many such centers are organized to help adult women with mid-life personal and career development problems, but they are also increasingly being used by men with similar problems (Entine 1975), and have received, sometimes with little or no advertising, a substantial response from adults in the population centers they serve. For example: The New York City Regional Center for Life-

long Learning received over 5,000 telephone inquiries in its first year of operation (1974), and by January 1975 was receiving 100 telephone calls a day. Similar counseling services with large responses have also opened at the Providence, Rhode Island, Career Education Project, and the Syracuse, New York, Regional Learning Service (Comly in Entine 1975, p. 6).

Mid-life career needs have also become a subject of considerable interest and controversy in the professional fields. Increasingly, professional organizations and their members recognize that the accelerated accumulation of knowledge in their fields requires them to develop more systematic methods for maintaining professional competency than has been true in the past (see El-Khawas and Kinzer 1975). Although there is considerable controversy as to the delivery systems that should be used for continuing education (e.g., Brown and Uhl 1970; Libby *et al.*, 1975; Wolkin 1975), there appears to be general agreement that such education is necessary in the professions. For example, one doctor comments:

> One of the stated objectives of undergraduate medical education is to help the student establish essential habits of continuing self-education. There are a number of indications that we have not been generally effective in reaching this goal (Cooper 1974, p. 617).

In fact, lack of participation in continuing education programs in the medical (Knox, in Charters 1973, p. 75) and legal (Wolkin 1975, p. 575) professions may be at least one factor in the movement underway in both fields to institute mandatory continuing education programs. These professions may not wait until more comprehensive government programs are developed to promote lifelong learning, but may themselves develop effective strategies for continuing education programs.

Special Adult Learner Problems

Despite the evident increase in adult participation in postsecondary education, there are indications that an even greater percentage of the adult population would be involved if certain barriers to their participation were eliminated. These barriers exist in our society's prevailing views that education terminates at some point early in adult life and that thereafter the ability to learn in an academic situation deteriorates. Therefore, little attention is given to serving adult learners' interests and needs.

The Carnegie Commission on Higher Education (1973) labeled the first of these barriers "psychological," recognizing that older people

as well as some faculty members correlate an increase in age with a decline in learning ability, and that this belief acts as a barrier to the adults' participation in education and their acceptance on campus. The Commission states, however, that there is no scientific evidence showing a direct relationship between the aging process and learning ability (p. 81). Older people may show a decline in physical abilities that affects their learning activities, but:

> it seems unlikely that they differ greatly [in physical capacity] from some of the younger students . . . who are already accepted on our campuses without prejudice (Carnegie Commission 1973, p. 81-82).

Another author concerned with the issue of career change in middle years Pascal, *et al.*, 1975) finds that there is no thoroughly satisfactory study available on the relationship between aging and learning ability. However, he concludes from the available studies that the ability to learn in later life depends upon a person's previously attained educational level. The ability and desire to retrain for a radical career change is also influenced by "the extent to which [an] old career was mentally challenging (Pascal, *et al.*, 1975, p. 44).

Although age may not significantly impair an adult's academic achievement, a question may be raised as to whether traditional teaching methods are appropriate for adults. There is some agreement that adults need instructional methods that will take advantage of their maturity, *i.e.*, their experience in accepting responsibility for their lives. Educators holding this view apply the term "andragogy" to the theory that maturity brings with it new requirements for educational instruction. Malcolm Knowles (1973), a proponent of this view, explains:

> Andragogy assumes that the point at which an individual achieves a self-concept of essential self-direction is the point at which he psychologically becomes adult. . . . Accordingly, in the technology of andragogy there is decreasing emphasis on the transmittal techniques of traditional teaching and increasing emphasis on experiential techniques which tap the experience of the learners and involve them in analyzing their experiences (Knowles 1973, pp. 45-46).[5]

Knowles (in Charters and Blakely, 1973) also observes that continu-

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[5]This approach is also becoming accepted by traditional colleges and universities that are opening up their programs to nontraditional activities requiring more self-direction: external degree programs, work-study programs, etc. (Wolfe and Williams 1974).

ing education programs for professionals that foster self-direction in further self-learning are useful because they enable a professional to transfer self-directed skills outside of formal programs. However, many programs seem to promote the idea that a professional's continuing education must always involve formal settings and experts. He also notes that university education stresses "what ought to be" while programs sponsored by professional associations tend to emphasize "what is" (p. 69). He suggests that a self-directed learner must be able to utilize both approaches.

Carp's (1974) findings on the preferences of "Would-Be Learners" for the lecture or class meeting method of instruction contrast with the above arguments for innovative instructional approaches for mature students. Of the Would-Be Learners, 28 percent chose this method, with on-the-job training receiving 21 percent of the Would-Be Learners' vote, and only 2 percent preferring such methods as television, travel-study, and video-tape cassettes (Carp 1974, p. 29). The study also asked Learners to report their participation in different methods of instruction. Here, Learners primarily used the lecture method (35 percent); 17 percent used self-directed learning with no formal instruction, while 14 percent participated in on-the-job training (Carp 1974, p. 30). The authors suggest that adult learners are reluctant to use new delivery systems, such as television instruction, because they do not offer the social interaction and peer support that the learners seek in an educational setting. The author therefore believes that delivery systems that provide such interaction and are convenient and inexpensive will attract adult learners (Carp 1974, p. 51).

Educational and political leaders may have to promote public acceptance of nontraditional delivery systems if other barriers to adult learning are to be eliminated. The two most frequently mentioned are financing and time[6] and many proposals are directed to redressing these problems. Nontraditional delivery systems, such as those described by Walton (1974), would provide greater access to educational material with less time expended in traveling to learning sites at savings in costs of instruction. Walton advocates greater use of the new technologies already available like videocassettes and cable television, and suggests that they be implemented in a "program approach" simi-

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[6]Carp and his associates found that Would-Be Learners report that cost (53 percent) and time (46 percent) are the chief barriers to their participation in further education (Carp 1974, p. 48). Cost was a particularly important consideration for those under 35, and the belief that there was not enough time (including the time necessary to travel to and from the educational site) for education was a consideration that increased with age.

lar to Valley's "Modes of Learning Model" (Walton 1974, p. 104). Valley proposed the development of:

> a degree-granting and institutional institution or agency [that] establishes a new degree pattern of learning and teaching that seeks to adjust to the capacities, circumstances, and interests of a different clientele from that which it customarily serves (quoting Valley in Walton 1974, p. 104).

Walton, however, would deemphasize the crediting function of this model because adults are not primarily interested in earning credit (p 105).

Walton also suggests that institutions could join together to form "lifelong materials service centers" that would

> provide coordination, assist in development, gauge research requirements, organize research projects, and provide other services that the individual institutions might require with specific programs of non-traditional studies (p. 107).

The center might also draw upon faculties at cooperating institutions to develop course offerings that utilize a variety of educational technologies that could then be used by the institutions. Efforts to utilize the new technologies are underway (see section on state plans for a discussion of the University of Mid-America).

Summary

Lifelong learning and recurrent education programs will ultimately have their greatest impact upon the 18 to 22 year olds' educational choices because it will open to them the possibility of making the incremental or intermediate education decision rather than an early and final decision. But for the immediate future such programs will be directed primarily at adults over 22 who may or may not have had some postsecondary education. Therefore, educational planners need information now on this basic lifelong or recurrent education population. There is evidence that the number of adults interested in postcompulsory education is on the rise, both in institutional and nontraditional settings. At the same time, there is a growing recognition that adult learning deserves respect and the attention of education policy makers and the academic community. With these developments comes a new regard for the interests of the adult learner and for the barriers to further participation in postcompulsory education. Little information is available in this area. Carp's study, however, gives some indication of the differences in needs and interests of the current adult learner and the potential adult student. Significantly, both

groups share a great reliance on educational institutions other than traditional credit-granting colleges and universities.

Adults also encounter barriers to further learning that are not usually eased by traditional institutions. These include a somewhat mistrustful attitude toward the older learner, financing the cost of education, and finding time to study. New delivery systems that break down these barriers and provide satisfying learning conditions for adults would greatly increase the number of adults participating in further learning.

Toward a Learning Society

Educational planners developed the concepts of lifetime learning and recurrent education as potential remedies for the educational problems of highly industrialized and technological societies. This chapter will examine some proposed and working models of recurrent education and lifelong learning, as well as specific strategies for their financing (particularly in the United States). It will also describe programs at several American colleges and universities that contain some, if not all, elements of the lifelong learning or recurrent education concepts.

Government Plans

While most proposals for recurrent education and lifelong learning are still in the initial planning stage, Sweden is prepared in July 1977 to implement major reforms in its postsecondary educational system. The reforms were proposed in a 1973 report *(Higher Education)* by the Swedish 1968 Educational Commission (U68). They emphasize the importance of postsecondary education as a social institution in listing the five major objectives of Swedish higher education: personality development; welfare development; democracy; internationalization; and social change (Swedish 1968 . . . 1973, p. 11).

Based on these objectives, the Commission's proposals for recurrent education call for a reorganization that would broaden access to postsecondary opportunities by easing the requirements for entrance, by creating more geographic accessibility through the development of new schools, and, most significantly, by changing the organization of programs. The latter change would enable students to move more easily into and out of the educational structure. The reorganization establishes four types of basic higher education programs; general, local, individual, and single course. The general programs, developed by the central government, would establish permanent educational requirements; the local programs would be established by individual institutions to meet local conditions; individual programs would also be arranged on a local level upon application of the student; and single courses would be offered to provide opportunities such as in-service and further training needs not met in a complete program (Swedish Ministry. . . 1975).

The emphasis in this reorganization is on developing a system of

recurrent education that will promote Sweden's higher education objectives (Swedish 1968 . . . 1973, p. 12), particularly the goal of providing greater social equity through better distribution of educational opportunity. The Commission believes that recurrent education is the preferable method of achieving this objective, rather than the traditional method of expanding education by lengthening or supplementing secondary education. The latter "tends to assign a decisive importance to choices made by schoolchildren" (Swedish 1968 . . . 1973, p. 12), by channeling the upper socioeconomic classes to higher education while imposing vocational decisions on young students years before they may enter the labor market.

These changes cannot be introduced suddenly. The Commission recognized that a full-scale recurrent education system must, instead, be introduced gradually, as secondary schools prepare their students for a considered choice between continued study and work. On the postsecondary level, the gradual change to a recurrent system includes, in the Commission's view:

- A marked increase in the number of places on single courses. The latter should be restructured with a view to the needs of, among others, those already occupationally active.
- The development of shorter occupationally geared educational programmes on which further training can be based.
- The development of new educational programmes designed for those occupationally active. Such programmes can have the same goals as existing ones (e.g. the training of nurses and similar personnel as doctors) or lack any counterpart in the present system (e.g. short-cycle technical programmes).
- The development of terminal stages on the longer educational programmes, where this is suitable in view of labour market conditions. In this way, it is possible to create alternative routes of recurrent study. (Swedish 1968 . . . 1973, p. 13).

As further encouragement for a recurrent education system, the reforms would give equal weight to job experience in selecting applicants for an educational program where the demand exceeds the spaces available. Special financial aid opportunities for adults would also be provided.

On a smaller scale, France has also instituted a system of government-supported education for workers in approved vocational programs. The system was implemented by the Continuing Vocational Education Act of 1971, which provides for an employer-employee payroll tax to establish an income maintenance fund for workers participating in company-sponsored or outside educational programs.

The fund provides the worker with a minimum payment of 90 percent of the average salary for his occupational group. These payments may be provided for a maximum of one year in a full-time program, or up to 1,200 hours of part-time study (Carnegie Commission 1973). The Act is generally understood to further the promotion of lifetime learning:

> The new Act establishes the principle of continuing vocational training as an integral part of lifelong education. . . . Its stated purpose is to enable workers to adapt to changes in techniques and in conditions of work and to promote their social advancement and participation in cultural, economic, and social development (Carnegie Commission 1973, p. 57, quoting the 1972 report of the International Labour Organization).

Unlike western European countries, the United States does not have a central ministry of education to develop and implement a comprehensive program of national educational reform. However, there is interest in the concept of lifetime learning, and some efforts are underway to familiarize the public with it. In the fall of 1975, Senator Walter Mondale introduced the "Lifetime Learning Act" as part of pending higher education and vocational legislation. Senator Mondale's bill is in itself significant recognition of the fact that many adults are interested in further learning and deserve support. The Act would focus federal efforts on the development of a lifetime learning society through the establishment of programs to: (1) collect and make available information on lifetime learning activities both in the private and public sectors of American society; (2) support further investigation into methods for fostering lifetime learning; (3) support institutional programs that would advance adult learning; and (4) study barriers to lifetime learning and provide recommendations for eliminating them.

Another piece of legislation, proposed by the National Advisory Council on Extension and Continuing Education (1975), asserts that there is a national interest in the development of a learning society. The Council proposes that Congress adopt as a *"matter of public policy"* a declaration that:

> . . . it is in the National interest that opportunities for lifelong learning through continuing education be available to all citizens . . . . continuing education is defined as any planned, purposeful education activity which furthers . . . the acquisition of knowledge, skill, personal awareness, or professional development, as well as the concerns of the community or Nation (p. 10).

It further recommends that Congress adopt a continuing education bill that would support the needs of adult part-time students who seek postsecondary education. Such legislation would work through existing institutions by strengthening their capacity to provide adults with financial supports and counseling and would improve resources for individual instruction. The Council's bill would also support dissemination of the findings of lifelong learning research programs.

Financing Proposals

In other discussions of America's movement toward lifelong learning, the primary focus appears to be on developing a financing plan that would enable adults to participate in further education, and would also, in most instances, provide financing for the traditional college age group. Under the aegis of the Education and Career Access, Education and Work Group of the National Institute for Education, several writers have produced a series of studies that examines the possibility of a national postsecondary *"entitlement,"* i.e., an educational voucher granted to students for their postsecondary education.[7] The series is largely based upon Levin's (1975) examination of three possible postsecondary entitlement (PSE) systems. Levin proposes such a system as the next possible step in the federal trend toward student-based, portable funding. A PSE would "represent a promissory note that every individual meeting particular eligibility requirements would receive at a specified age, for example at 18" (Levin 1975, p. 2).

An entitlement would not necessarily be a simple, direct grant. Rather, a PSE might be a grant, or a combination of direct grants and loans, with the ratio between the two to be determined by factors such as family income, cost of education, living expenses, and cost of foregone income. It would be designed to equalize the distribution of resources among students from a lower socioeconomic background with those with greater family recources. Funding for this program would be provided through revenues from the federal income tax or some other broad-based tax. While Levin's proposal is primarily aimed at the traditional 18 to 22 year old postsecondary student population, there would be no age limit to a PSE, so it might also be

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[7]Another federal agency has also been concerned with this subject. See [The Comprehensive and Current Overview on the Education of Adults in the United States, with a Special Focus of Lifelong Learning.] Washington, D.C.: Division of Adult Education, U.S. Office of Education, forthcoming.

applied to the special financial needs of adult learners discussed in Chapter 2.

A student would use a PSE one of three ways, which are referred to as "models," each designed to further career training. Model I, the most conservative, would allow a student to use a PSE for education and training only at formal institutions, such as those eligible under the GI Bill. Model II would allow a student, in addition, to use a PSE for more informal programs such as on-the-job training or an apprenticeship. The qualifying status of such programs might be based on criteria established by the Manpower Development Training Act's on-the-job training programs; and the programs might be embodied in an agreement between the educational source, e.g., a business or union, and the learner, which sets out the terms and conditions of the program and includes a provision for evaluation results. Model III extends the Model II concept to permit a student to use a portion of a PSE to purchase physical capital (e.g., tools and facilities) that will enhance career development. In Levin's view, the advantage of Model III is that it enables a student to obtain necessary job skills while creating jobs through the purchase of physical capital (Levin 1975, pp. 11-13).

Levin acknowledges that a Model IV could be developed that would permit a student to use a PSE for noncareer educational goals, but he believes that public funds should be used for more important priorities and therefore should be invested only in career development.

Norman Kurland (1975) rejects this conclusion and proposes that a Model IV would merit funding. As an advocate of the lifelong learning concept, Kurland views education in a broader perspective than Levin, and argues that a Lifelong Educational Entitlement (LEE, a remodeled PSE) should only be granted to adults over 22, to be used in Model I and Model II educational activities, which would *not* be limited to career-oriented programs. He proposes that a $200 annual LEE be given to each person, which would accumulate with interest in the years it was unspent. The LEE would be drawn from general revenues. To provide for educational needs beyond the annual LEE, Kurland proposes a system of "drawing rights" that would enable an individual to draw upon some future portion of his LEE; his portion would be determined by such factors as the student's age, level of education attained, income, and the nature of the educational program (Kurland 1975, p. 27).

Levin and Kurland's models are similar to other proposed strategies

specifically designed to promote lifelong learning or recurrent education. Stephen Dresch (in Mushkin 1973) proposed the establishment of a "Human Investment Fund," a variation of the 1969 Tobin-Ross National Youth Endowment plan, which would provide a person of any age with drawing rights to an educational fund. An individual would have to decide to participate in this program by age 25. The fund would be accumulated from a tax on a fixed percentage of total income for a thirty-year period beginning at age eighteen. Before age forty-eight (the end of the thirty-year period), an individual would be restricted to using the fund for "broadly defined human capital forming purposes" i.e., to enhance an individual's social role through education (Dresch in Mushkin 1973, p. 274), and the amount withdrawn would be determined by direct educational costs and a living allowance. After age 48, the balance of the individual's endowment would be considered an unrestricted asset, available for any purpose.

On a broader scale, Allan Cartter (cited in Carnegie Commission 1973) proposed that each individual at age eighteen receive a social security number and thereby become eligible to draw upon a personal social insurance account after a minimum period of employment (Carnegie Commission 1973, p. 63). This account would provide one-half of tuition costs for up to four years. Adult education would be funded by a system of employer and employee contributions to the fund, with benefits to include:

(1) After five years' employment, monthly tax-exempt subsistence allowances would be available. These would be determined by whether part-time or full-time study was undertaken. Each year of employment would equal one month of eligibility.

(2) After age 40, the subsistence program would be broadened from approved education or training to other, less traditional educational activities.

(3) After age 40, eligibility credits could be used for noneducation purposes, but only by using two months of eligibility credit for each month of subsistence payments.

(4) Spouses without work experience could draw upon their partner's account at a 50 percent benefit level.

And (5) after 60, the balance in the account could be either withdrawn in a final payment or added to Old Age and Survivors Insurance and used for higher pension benefits (Carnegie Commission 1973, p. 64).

State Plans

On a state level, a variety of adult and continuing education programs have been generally available for some time. There has also been a concerted effort to broaden access to postsecondary institutions. However, it is only recently that some state governments have begun to examine these and other educational problems in light of the lifelong learning and recurrent education concepts.

In Minnesota, a project looking toward an "Intergenerational Living, Learning, and Teaching Society," is being developed to implement lifetime learning on a state level, which may serve as a model for lifetime learning systems in other states (Ferber 1975). As a first step in this project, Daniel Ferber, the project developer, is directing a pilot program that will bring adults who are at least age 55 onto six college campuses in Minnesota. The project is receiving some federal funding to assist the participating colleges in developing education programs for these adults and in training personnel in geriatrics and adult education.[8] These "older adults" are seen by Ferber as the first target group in a step-by-step plan to attract other special interest groups onto college campuses. Ferber also plans to develop the concept of a "national consortium of post-secondary *intergenerational residential campuses*" that will develop new services for a new clientele, and he promises to promote the development of at least one such campus in every state by the end of 1976 (Ferber 1975).

In contrast to Ferber's approach, which would build upon the resources of existing colleges to foster a lifetime learning society, Nolfi and Nelson (1973) propose that Massachusetts build on the base of the continuing and part-time education programs that are already available in the state an alternative postsecondary education system for adults. Although this proposal is not couched in terms of "lifetime learning," it has many of the hallmarks that would identify it as such a plan; its focus is on adults, their needs, and barriers to further educational attainment; it is not limited to any age group; and its financing is designed to achieve greater social equity.

Nolfi and Nelson chose the system of continuing and part-time education rather than the traditional college and university programs because the former has adopted methods and structures more suited to an adult's educational needs. However, there is a serious problem

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[8]Minnesota also passed a bill in May, 1975, granting citizens over 62 years of age some tuition-free benefits at state-supported institutions of higher education.

with this system because it has been accorded second-class status by the tradition higher education institutions: its revenues have been used to subsidize regular daytime programs; its students cannot easily transfer their continuing and part-time education credits to the day-time programs; and "its operational differences from the full-time day program have been seen as negative rather than positive attributes" (Nolfi and Nelson 1973, p. 73). These problems arise although continuing and part-time education programs in Massachusetts' postsecondary institutions are sponsored by separate institutional divisions. In the public sector, they are the divisions of continuing education or extension; in the private institutions these programs are generally under the aegis of the evening division or college. The authors propose that students, courses, and programs in these divisions or colleges form the base of the alternative adult postsecondary system. In addition to the traditional two- and four-year degree-granting institutions, the authors include "all proprietary institutions, postsecondary activities of regional vocational-technical schools, adult education provided by school systems and by private centers, home-study correspondence schools, and the education output of employer-based educational programs" (Nolfi and Nelson 1973, p. 1). Part-time students are only considered for this alternative system if they do not regard study as their major occupation.

To implement their plan, Nolfi and Nelson argue that the part-time and continuing postsecondary education system must be strengthened if it is to become a viable alternative for adults. They contend that this system has been subordinated to full-time regular programs through financial abuse and through a negative attitude about the merit of its educational programs for adults. To remedy this situation and thereby strengthen the continuing education system, the authors propose that, with only some exceptions, all part-time students be enrolled in the continuing education and part-time study programs on each campus (Nolfi and Nelson 1973, p. 75).

Nolfi and Nelson are also particularly concerned with breaking down barriers to access that have been experienced by low-income, poorly educated, and minority groups. To this end, they propose (emphasis in original):

> *. . . increased use of educational technology, variety of times offered, better transportation, services, counseling and outreach services, publicity, vouchers for special clientele in need of financial aid, and the creation of Educational Opportunity Centers in each service area (Nolfi and Nelson 1973, p. 94).*

This recommendation for statewide counseling and outreach centers (Area Educational Opportunity Centers) is based upon the success of Regional Educational Opportunity Centers (REOC's) that were started in spring 1973 and continue in operation in six low socioeconomic areas throughout Massachusetts. The REOC's are essentially designed to assist residents of the surrounding area, although they are open to adults outside the immediate community.

Another recommendation by Nolfi and Nelson that has some prospect of immediate viability is the proposal for vouchers for special clientele. Pending in the Massachusetts State House is a bill that would create "The Adult Recurrent Education Entitlement Voucher Program" (see Nolfi 1975). This program would grant eligible students a voucher for tuition costs of up to fifty dollars per credit-hour for no more than two three-credit courses per term, which would include extension, continuing education, evening division, or other similar courses. The institution would then be reimbursed by the state. A recipient would qualify for this program by virtue of his level of income and previous educational experience (less than four years of college), the amount of the voucher varying with the applicant's income and prior education. The student would be entitled to "no more than thirty-two courses, the equivalent of four years of college, or a bachelor's degree, whichever comes first" (House . . . No. 4932 in Nolfi 1975, p. 46-47).

Nolfi and Nelson would also organize this alternative system on a geographic basis throughout Massachusetts to provide better service to current and potential students. The existing alternative system is duplicative and wasteful of effort, in the authors' view. They propose that a voluntary Service Area Planning Board (SAPB) be developed in each of 13 geographic areas for better program planning and development. These boards would act as centers for cooperation and development among their members, but final program approval would be left to state authorities. Participation in these boards would be voluntary. Members would contribute 25 percent of the board's financial costs, with 75 percent in matching funds provided by the state. The state's matching contributions would be an incentive for institutions to join the board because of the board's proposed function to provide "outreach" services, such as advertising, and communication between member institutions. Further, institutions would not be eligible for the proposed voucher program unless they were members of the SAPB. (Such a provision is absent from the pending legislation.)

Another effort to increase learning opportunities for adults is being launched by the University of Mid-America (UMA), a consortium composed of Iowa State University, Kansas State University, the University of Kansas, the University of Nebraska, and the University of Missouri. The UMA was organized to develop and implement new delivery systems and other educational innovations for adult learners. UMA directs its efforts to those students who "are reluctant to attend a regular, campus-based program. It is not the intent to seek out students who would otherwise enroll in existing programs in . . . colleges" (University of Mid-America 1974, p. 3). Beginning in early 1975, UMA made multimedia courses available through its member institutions as the first step in the development of an open learning network in these states.

Credit and noncredit college-level courses are offered in instructional packages (including printed materials, television programs, and audio cassettes). These packages enable students to study at their own pace in locations and at times that are most convenient for them. UMA believes that this freedom from the geographical and time-frame restrictions of traditional postsecondary education will encourage the enrollment of students who consider such restrictions barriers to their further education. However, UMA also proposes to work closely with its supporting institutions in the development of its curriculum, so that students can transfer to a campus-based program, and to work with these institutions in developing new course offerings that may not be for credit. It also sees as a long-range goal the development in each state of a learner-based program that would utilize UMA-developed offerings and institutional resources to develop programs for individual learners.

Individual College and University Programs

To attract new students to their campuses, some American colleges have developed programs that exhibit characteristics found in proposals for lifetime learning and recurrent education programs. The institutional programs that have appeared do not usually result from deliberate efforts to promote recurrent education (or lifetime learning). Instead, the programs are designed to attract new students at a time when interest in attending college seems to be declining; however, they incorporate many of the elements that Regan (1972) identifies (see footnote 1).[9] Such programs succeed by

[9]There are projections, however, that fall 1975 will see an increase in enrollment on college campuses across the country. See "Fall Enrollments May Set Record," *The Chronicle of Higher Education 10* (August 18, 1975): 1.

> uncovering specific needs, satisfying these needs by the development of the appropriate goods and services, letting people know of their availability, and offering them at appropriate prices, at the right time and place (Krachenberg 1972, p. 380).

The primary target of these new efforts is the adult population. Despite the findings of Carp (as discussed in Chapter 2) that adults generally prefer noncampus educational experiences, some institutions have found that on-campus programs carefully tailored for specific needs can be successful. For example, the Weekend College program at the C.W. Post Center of Long Island University meets many of the criteria suggested by Regan and also makes use of marketing techniques to identify and attract its adult student population. Begun in 1971 with an enrollment of 241 students and 22 courses, the Weekend College has now expanded to more than 2,500 students and five degree programs. Programs offered include: B.S. in Nursing; a Master of Professional Studies in Health Care Administration; a Master of Professional Studies in Criminal Justice; an A.A. in Humanistic Studies; and an A.A. in General Studies (Meskill (1975) and Stashower (1974)). The programs are usually traditional in method and content, and are implemented only after extensive market research has shown a need for and interest in their development. The Weekend College's success in attracting students is primarily due to its breakdown of time barriers. Students choose courses that run for six consecutive six-hour sessions on a Saturday or Sunday, or two two-day weekends separated by five weeks of independent study. The weekend format therefore makes college accessible to working people, to housewives without babysitting resources, and to those for whom daily commuting trips would be difficult during the week. As an added benefit, the college's developers find that the intensive nature of a long classroom session provides adults with psychological support through group interaction (Meskill (1975) and Stashower (1974)). The Weekend College also provides flexibility for adult students by granting specified amounts of credit for prior off-campus learning. In addition, it supplies counseling and support services that adult students may need through pre-program noncredit speed reading and study skills courses.

The College of New Rochelle has met with similar success in attracting adult students to its School of New Resources. However, the school differs from other programs for adults because it is not vocationally oriented. Its focus is on human development and the liberal arts:

> the liberal arts approach promotes expanding and humanizing perceptions which develop the student's ability to participate within his or her total environment. This is particularly important for adults since many have been denied that conscious understanding of themselves and their institutions (Shea 1974, p. 29).

Begun in 1972, the School offers a Bachelor of Arts degree at three different locations: at the College of New Rochelle (New York), at Co-op City (a large residential area in New York City), and at the union headquarters for New York City's District Council 37, American Federation of State, County, and Municipal Employees, AFL-CIO. The school's attraction for adults, however, is not primarily its geographic accessibility but the fact that its education program is specifically designed to build upon an adult's life experience and capacity for independent decision making. Therefore, there are no specific course requirements for a baccalaureate. An adult entering the school may gain up to thirty credits for completing a "life experience portfolio," i.e., "a detailed and reflective autobiography that should communicate the nature of one's life experience as well as an understanding of the learning acquired through these experiences" (Esperdy 1975). Credit based upon the College Level Examination Program is also granted. The school's students have several options in planning their educational programs. Besides being given credit for life experience, they may take "core" seminars, independent study, and regular courses at the College of New Rochelle. Students participate in the planning for the curriculum each term, a process that enables them to study subjects of particular interest and that gives them some responsibility for curriculum. (Esperdy 1975). The "core" seminars (offering six credits) are so called because they are designed to stimulate student interest in other courses that may naturally evolve from a core seminar. When fifteen or more students support a student suggestion for a new course, they constitute a "negotiating body" that plans with a staff member the development of the course and the selection of the teacher (Fischer 1973). Students also may initiate a contract for independent study, earning three to six credits for each project and up to 30 credits overall. The School accepts projects in any area, but particularly encourages projects that are connected with work or volunteer experiences (Fisher 1973).

The C.W. Post and School of New Resources programs are directed toward specific sorts of adult interests, but other programs have been developed that are designed for adults designated as a target group because of their age, e.g., citizens over age 55 who are retired from working life. These citizens are generally not active participants

in postsecondary education, but they are increasingly being recognized as an important segment of the American population, one that may gain real benefits from further educational experiences. Thus, the American Association of State Colleges and Universities reports (*Alternatives for Later Life and Learning* 1974) that 150 of its member institutions are involved in special efforts for older citizens. Such efforts fall into four areas:

- Special provisions for increased access to regular acamedic programs and cultural offerings of the institution, e.g., tuition reduction is a common mechanism;
- Special programs designed to foster older citizens' participation, such as the retirement planning program at the University of Tennessee at Nashville;
- Preservice and in-service training for professionals and paraprofessionals in gerontology fields; and
- Other types of institutional activities in these areas.

This last category subsumes a wide range of programs, such as faculty involvement with area senior citizens groups or counseling older adults on their reentry problems when returning to a college setting (*Alternatives for Later Life . . .* 1974).

These programs vary in the extent to which they involve older citizens in campus life. For example, "The Bridge Project" at the Fairhaven Campus of Western Washington State College is an effort to thoroughly integrate its population of retired people into the campus community. Funded as a pilot program by the Fund for the Improvement for Post-Secondary Education, the Bridge Project has as its goal the promotion of "intergenerational living, learning, and sharing" on campus (Fairhaven College). To this end, it has remodeled campus buildings into an apartment complex for its more than 30 resident retired people. These retirees may take courses for credit or adult classes and are encouraged to participate in campus activities and become acquainted with the younger students on campus. An evaluation of the project (Gerstl 1975) found that it had been generally successful in providing meaningful experiences for its retired population and in affecting the learning experiences of the younger students as well:

> The "Bridgers" feel that the Program places them in an atmosphere where intellectual, as well as psychological and social, growth is encouraged and fostered. The vast majority of Bridgers are involved in the process of learning and teaching. Bridgers are not only beneficiaries; they are donors as well, contributing to the growth and development of the students, teachers, and staff with whom they interact (Gerstl 1974, p. 3).

Summary

In Europe and the United States there is clear movement toward the implementation of the recurrent education and lifetime learning concepts. In Sweden, a radical reorganization of the postsecondary educational system will be introduced this year, with one of its principle objectives being to achieve greater social equity through a wider dispersion of educational options. While such a wholesale restructuring would be impossible in this country because of our decentralized system of education, legislation has been proposed that would involve the Federal Government in the promotion of the lifetime learning concept. Such legislation would provide support for research and development in the field of adult learning and for institutional efforts to provide learning opportunities for adults. Some participants in discussions on lifetime learning and recurrent education have also developed financing plans to implement these concepts. Several of these plans would revamp the entire system of financial aid for postsecondary education, so that students would know at age 18 that there were long-range opportunities for education through a system of entitlements. Other proposals would only be directed toward adults over 22. There are also differences in the proposals on the education programs that should be supported in this manner as to whether the programs should have a career orientation or be more broadly based. On the state level, many systems of postsecondary education have programs of continuing and part-time education, and these programs might be a basis for a more formal postsecondary education system for adults, as suggested in the Massachusetts plan.

There is also grass roots activity in America's colleges and universities that indicates support for the lifetime learning and recurrent education concepts, although this activity has not formally been placed in these frameworks. These institutional programs are designed to attract adult learners by meeting special adult needs in terms of access, modes of instruction, and curricula.

To date, federal and state interest in the learning society concept has merged infrequently with institutional activity that promotes this idea. With greater awareness of their mutual interest, both sectors may expand their efforts to develop this concept.

Conclusion

Advocates of the learning society see educational opportunities as an integral part of each individual's working and personal life. At a basic level, the concept of a learning society is being experienced in the United States by the substantial number of adults who seek out postsecondary educational opportunities. Their goals in these activities are to enable them to better adapt to changing social and economic conditions and to serve their self-interests. A question then arises: Should public strategies be developed to augment this adult learning sector by supporting greater access to postsecondary education programs or by reformulating our concept of postsecondary education? This latter choice implies that all postcompulsory education would be designed with the understanding that such activities are continuous throughout one's lifetime.

Advocates of recurrent education and some lifelong learning supporters believe the answer is in the affirmative for reformulating the postsecondary education system. They contend that postcompulsory education has been and should be the major vehicle for achieving social equity and providing proficient employees in an increasingly complex society. They would therefore attempt to return the postsecondary education system to its professed egalitarian goals in light of social and economic changes that have altered our perceptions of how best to achieve these goals. However, the success of such large-scale social engineering is uncertain. The goal of providing access to all who seek it in the current postsecondary education system seems near, but critics of the front-end-loaded model are finding this structure is not suited to rapidly changing social and economic development. From this example, it appears that major reforms occurring over a substantial period of time should provide for future social and economic variables, such as the opening and closing of job markets, international influences on our economy, or new social attitudes toward work and personal development. In planning reforms, however, a more radical question needs to be asked: Is education the major factor in upward social mobility?

It appears unlikely that long-range reform would occur in the United States because of this country's decentralized educational structure and the financial costs involved in such a major undertaking. More probable is the increase of federal and state involvement in

supporting current lifetime learning activities and promoting their further development. Such involvement would seem more financially feasible and politically wise in responding to the educational needs of many adult learners. If this strategy directed at the adult population were undertaken in the belief that it would serve the goal of social equity, safeguards would be needed to ensure that it did not result in segmentation of our postcompulsory education system. Such division, by assigning greater educational and social status to particular forms of postsecondary education, might actually create less equity in a credential-conscious society. Instead, greater consideration needs to be given to public acceptance of the integration of work and learning throughout the lives of all postcompulsory students, so that all education and work choices merit respect. Implementation of some of the financial proposals described in this report might further this development.

Dissatisfactions with the current front-end-loaded model of postcompulsory education appear to be causing educators, governments, and students to seek reforms that would enhance educational opportunity throughout the course of a lifetime. While public policy discussions continue, single and cooperative institutional efforts to reach nontraditional students are underway. These new efforts could prove to be the resource material and the foundation for any lifelong learning policy that is developed.

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